

Mail Merge in Word 2007 and 2010

Mail merge is a way to put content from a data base such as a spreadsheet in a word document. That document can then be used to send the same form letter to many recipients *or* to create mailing labels or envelopes.

Several very good tutorials to develop proficiency with this feature can be found on the Microsoft website. The easiest way to get to that website is to do a Google search for “Microsoft Word mail merge tutorial.”

There are three parts of a mail merge exercise. They are: the main document, the source for recipient information, and the merged document.

1. The main document is created leaving “placeholders” called fields for information that will be taken from the recipient source information. That document can be pre-existing or it can be created during the mail merge process.
2. The recipient list is any document that has specific information about a recipient listed in rows and columns. Each column represents a field or a specific bit of information about the recipient. Fields should represent the smallest bit of information about the recipient. For instance, first name and last name, address, city, ST, ZIP, etc. Each row contains the complete set of information about one recipient. The recipient list can be one that is already created or one that is created during the mail merge process.

Merge fields can be individual fields or made up of other fields such as in an address block. As with all formatting changes, the entire field including the chevrons must be selected in order to edit it.

The program first looks for the recipients list in the folder “My Data Sources” which is in the “Documents” folder. For that reason, it would be a good idea to save your recipient lists there. *However, you can browse to and select any folder and file you want.*

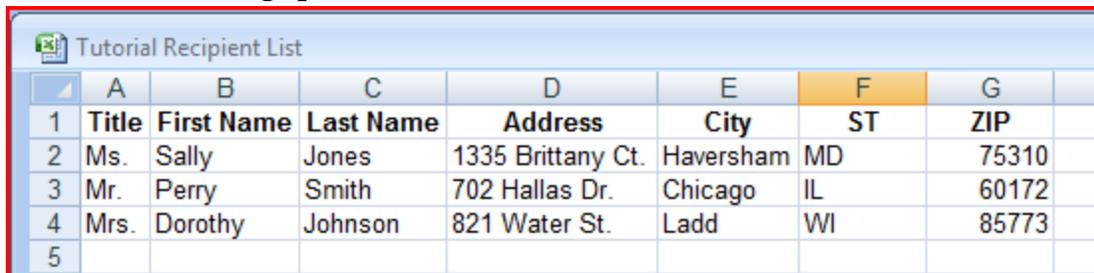
3. The last of the three parts is the completed, merged document. Each of these documents is a separate document that can be printed. It can also be saved as a Word document if wanted or the merge can be executed again to create the document(s).

We will complete two exercises to demonstrate using the mail merge wizard process. The first will create mailing labels and the second will create envelopes. You can also use parts of the ribbons to achieve the same results.

Create Labels using Mail Merge

The first thing we will do is create the recipient list. This list can be from contacts in Outlook or in a Word table. For this exercise, we will create the data base in an Excel spreadsheet.

- Open Excel.
- Create the following spreadsheet.



	A	B	C	D	E	F	G
1	Title	First Name	Last Name	Address	City	ST	ZIP
2	Ms.	Sally	Jones	1335 Brittany Ct.	Haversham	MD	75310
3	Mr.	Perry	Smith	702 Hallas Dr.	Chicago	IL	60172
4	Mrs.	Dorothy	Johnson	821 Water St.	Ladd	WI	85773
5							

- Save the file in the My Data Sources folder in the Documents folder using this as the file name: Tutorial Recipient List.
- Exit Excel.

The next part uses the Mail Merge Wizard to complete the process.

- **Open** a new word document.
- Choose the **Mailings tab**.
- From the Start Mail Merge group, click on **Start Mail Merge** and choose **Step by Step Mail Merge**.
- Scan the information on the right side and **choose labels**. At the bottom note that this is Step 1 of 6 steps.
- Click on **Next: Starting document**.
- Choose **Use the current document**.
- Preview the label options (in the center) and **choose Avery 8160**.
- Click on **Next: Select recipients**.
- Under Select recipients, choose **Use an existing list** then click on **Browse** to locate your recipient file.
- When you find the file, **click OK** and then **OK again**. Note the things you can do with the recipient list such as sort. Remove the check mark before a name if you do not want to include that name in the merge.
- Click on **Next: Arrange your labels**.
- Choose **Address Block**.
- Select the **format** for the recipient's name.
- **Match fields** to see that all you want are included; click **OK**.
- Click on **Update all labels** so the program will move from one to another label.

- Click on **Next: Preview your labels.**
- Click right or left arrow to see all labels.
- Click on **Next: Complete the merge.**
- Click on **Edit individual labels** and **choose all** to see all labels.
- Save the document for reuse if you want.
- Exit Word.

This completes the label exercise.

Create Envelopes Using Mail Merge

You will use the same recipient list for this exercise.

- Open a new word document.
- Choose the **Mailings tab.**
- From the **Start Mail Merge group**, click on **Start Mail Merge** and choose **Step by Step Mail Merge Wizard.**
- Select **envelopes.**
- Click on Next: Starting document.
- Choose “change the document layout” and then click on envelope options in the center.
- **Choose Size 10, click OK** and click on **Next: Select recipients.**
- Choose **use an existing list** and then **browse** to find and select the recipients file.
- **Click OK; preview** the window and **click OK.**
- Click on **Next: Arrange your envelope.**
- A **size 10** document appears. **Click on the center of the envelope to insert the address block.**
- **Select address block.** Word has preformatted that to include the name, address, city, ST, and ZIP.
- Make sure that **insert postal address** is checked and, **if necessary, match fields.**
- Click on **Next: Preview your envelopes.**
- After previewing, click on **Next: Complete the merge.**
- You can choose to print after placing the envelopes in your printer tray as directed to do.
- When you choose **edit individual envelopes** and then **all** you can see all envelopes in the current merge displayed in a new document. If you want, you can save that document. It is not automatically saved.

This completes the envelope exercise.